



# CASE MANAGER TOOLS



ASSIGN  
YOURSELF  
AS CASE  
MANAGER

Client - (3) Fury, Nicholas

# Assigning yourself as a case manager in HMIS offers numerous benefits:

## Client Information

➤ Tailored Reports

Summary ➤ Ownership and Accountability

➤ Streamlined Case Management

Added to the system 01/28/2025 04:10 PM

➤ Real-Time Monitoring

➤ Better Case Documentation

Name Fury, Nicholas

➤ Improved Communication and Collaboration

Date of Birth 07/04/1950 (Age 74)

➤ Data-Driven Decision Making

Race and Ethnicity Black, African American, or African

➤ Better Client Outcomes

Gender Man (Boy, if child)

## Service Transactions

Entry / Exit

Case Managers

Social Security \*\*\*

U.S. Military Veteran? Yes

# Assign yourself as Case Manger

1. Choose household members.
2. Select “Me” your information is filled in automatically.
3. Choose the provider/program
4. Click “Add Case Manger”

**Case Manager - (3) Fury, Nicholas**

▼ Household Members

**i** To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(1) Other-Non Relative **1**

(2) Banner, Bruce

(3) Fury, Nicholas (Left Household: 01/29/2025)

(3) Other-Non Relative

(6) Danvers, Carol

(3) Fury, Nicholas **2**

**Type \***  Community Services User  Me  Other

**Name \*** Jessica Jones

**Title** Case Manger

**Phone Number** 727.333.3333

**Email Address** jjones@hlapinellas3.org

**Provider \*** Homeless Leadership Alliance of Pinellas, Homeless Prevention (16841) **3**

**Start Date \*** 03 / 07 / 2025 **4**

**End Date** / /

**Add Case Manger** **Cancel**



# HOME PAGE DASHBOARD COUNTS REPORTS

Customize your home page with ready to run reports

Home > Home Page Dashboard

System News (50) My Agency News (0)

Date	Headline
09/10/2024	BusinessObjects is back online
09/09/2024	BusinessObjects Outage: Data Not Returning – Ticket Submitted
09/06/2024	HMIS Virtual Office Hours This FRIDAY!!!
08/02/2024	HMIS Virtual Office Hours This FRIDAY!!!
06/07/2024	HMIS Virtual Office Hours This FRIDAY!!!
05/03/2024	HMIS Virtual Office Hours This FRIDAY!!!

Add System News View All

**Customize Home Page Dashboard**

Legal Notices

Left sidebar menu: Last Viewed, Favorites, Home, Clients, Resources, Shelters, Activities, Scans, Reports, Admin, Logout

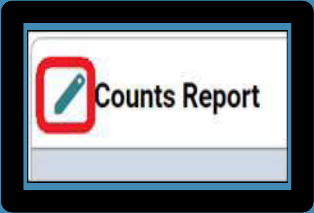
Keep track of your clients using the Counts Report on your dashboard. To add a Counts Report to your dashboard, select the black arrow next to Customize Home Page Dashboard.

Customize Home Page Dashboard

Add Activity Referrals Preview Activity Referrals **Add Counts Report** Preview Counts Report Add Follow Up List

Preview Follow Up List Remove All

To add the Counts report, click on the box with green plus sign pictured below.



From there, customize your Counts Report by clicking the pencil and Edit Dashlet.

# COUNTS REPORTS

odifications.

**Save** **Undo Changes**

**Counts Report** [Close]

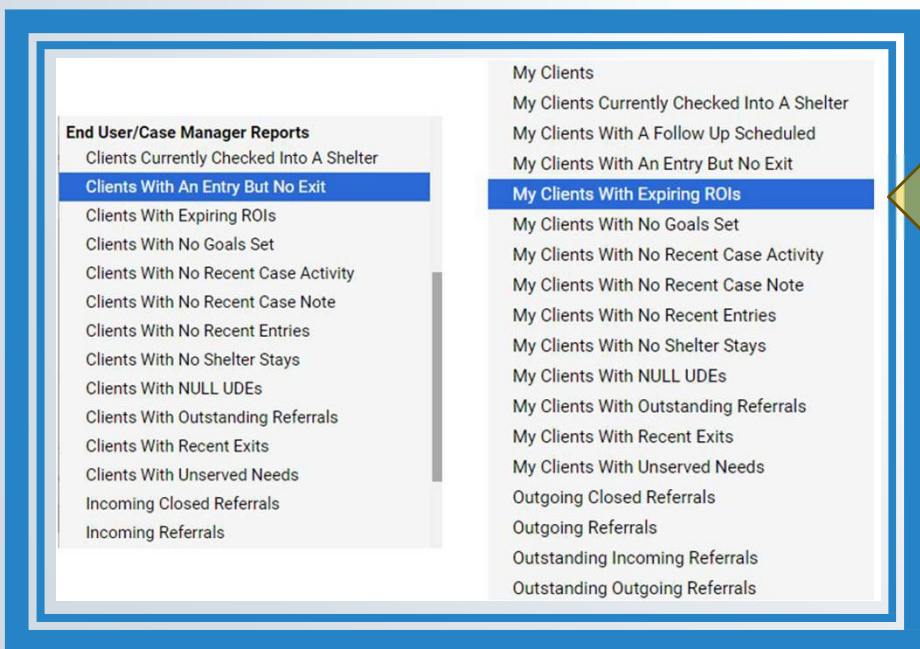
<b>My Clients With NULL UDEs:</b>	<b>My Clients With Expiring ROIs:</b>
<b>0</b>	<b>0</b>
<b>My Clients With Recent Exits:</b>	<b>Shelters Below Capacity:</b>
<b>0</b>	<b>138</b>

**Refresh**

Four quadrants can display 4 different Counts Reports to be added and customized. They will show up on your Home Page Dashboard. These include clients with NULL UDEs, clients currently checked into shelter, my clients with recent exits, my clients with expiring ROIs, and more! Don't forget to save.

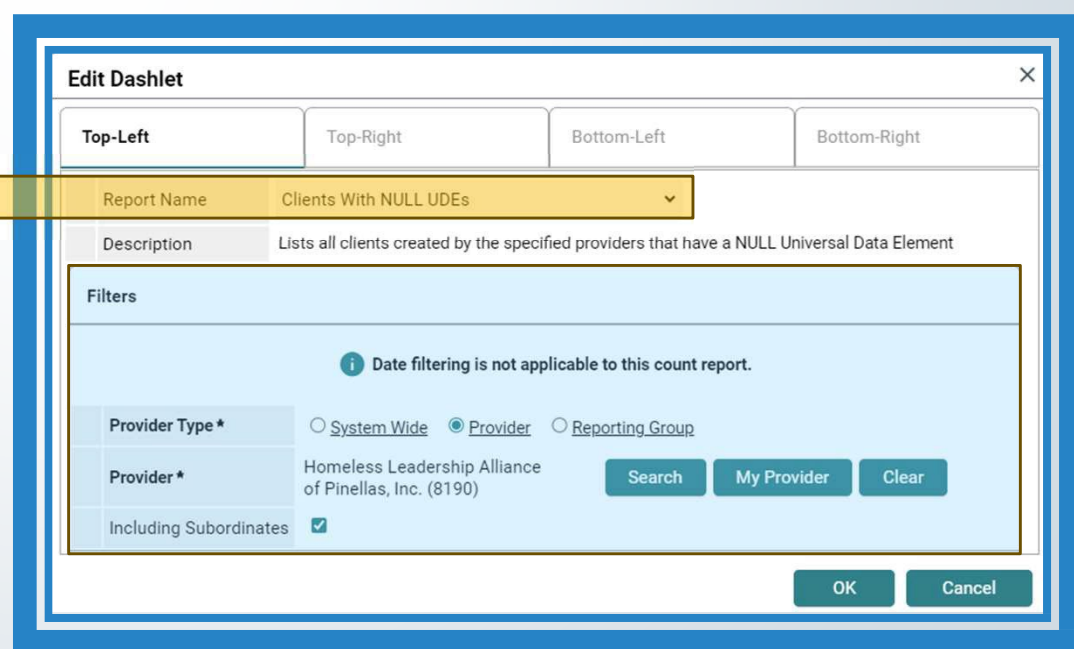
# COUNTS REPORTS

- Select Provider Type\*
- Click the check the box next to Including Subordinates.
- “Clients” reports will pull agency specific Counts Reports.
- “My Clients” reports will pull user specific Counts Reports (assigned yourself as a case manager).
- Agency Administrators have access to reports covering all end users within the agency.



This screenshot shows a list of reports under the heading "End User/Case Manager Reports". The list is divided into two columns. The left column contains reports such as "Clients Currently Checked Into A Shelter" and "Clients With Expiring ROIs". The right column contains reports such as "My Clients" and "My Clients With A Follow Up Scheduled". The report "My Clients With Expiring ROIs" is highlighted with a blue bar, and a yellow arrow points from this report to the "Edit Dashlet" window on the right.

End User/Case Manager Reports	My Clients
Clients Currently Checked Into A Shelter	My Clients Currently Checked Into A Shelter
Clients With An Entry But No Exit	My Clients With A Follow Up Scheduled
Clients With Expiring ROIs	My Clients With An Entry But No Exit
Clients With No Goals Set	My Clients With Expiring ROIs
Clients With No Recent Case Activity	My Clients With No Goals Set
Clients With No Recent Case Note	My Clients With No Recent Case Activity
Clients With No Recent Entries	My Clients With No Recent Case Note
Clients With No Shelter Stays	My Clients With No Recent Entries
Clients With NULL UDEs	My Clients With No Shelter Stays
Clients With Outstanding Referrals	My Clients With NULL UDEs
Clients With Recent Exits	My Clients With Outstanding Referrals
Clients With Unserved Needs	My Clients With Recent Exits
Incoming Closed Referrals	My Clients With Unserved Needs
Incoming Referrals	Outgoing Closed Referrals
	Outgoing Referrals
	Outstanding Incoming Referrals
	Outstanding Outgoing Referrals



This screenshot shows the "Edit Dashlet" window. At the top, there are four tabs: "Top-Left", "Top-Right", "Bottom-Left", and "Bottom-Right". Below the tabs, there is a "Report Name" dropdown menu set to "Clients With NULL UDEs". Below that is a "Description" field with the text "Lists all clients created by the specified providers that have a NULL Universal Data Element". Below the description is a "Filters" section. It contains a message: "Date filtering is not applicable to this count report." Below this message are three radio buttons for "Provider Type\*": "System Wide", "Provider" (which is selected), and "Reporting Group". Below the radio buttons is a "Provider\*" field with the text "Homeless Leadership Alliance of Pinellas, Inc. (8190)". To the right of the provider field are three buttons: "Search", "My Provider", and "Clear". Below the provider field is an "Including Subordinates" checkbox which is checked. At the bottom right of the window are "OK" and "Cancel" buttons.

# Running the Counts Report

Count Details

My Clients With NULL UDEs

Client ID	Last Name	First Name	Middle Name	Suffix	Date of Birth	Race	Secondary Race (if provided)	Ethnicity
165	Graham	Aubrey	Drake		10/24/1986			
166	Star	Mazzy			02/28/2023			
164	Swift	Taylor			12/13/1989	White (HUD)	White (HUD)	Non-Hispanic/Non-La

Download Full Report


Showing 1-3 of 3

Counts Report

My Clients With NULL UDEs:	Clients With NULL UDEs:
3	197

Refresh

Once your counts reports are up, you can click on the number in the dashlet to open the report and view the information. Users can also download the full report in a CSV file which can easily be converted to excel. The last step is to save your changes to the home page dashboard at the top of the screen.



# CASE NOTES



# ADDING INITIAL CASE NOTE

Client - (4) Gilmore, Rory

(4) Gilmore, Rory

Release of Information: **None**

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

**Case Plans**

Goals

Classification

Type

Date Added

Date Set ▼

Notes

Latest No

Add Goal

No matches.

# SET THE GOAL

1. Choose Household Members
2. Choose Provider/Program
3. Select Yourself as Case Manager
4. Set Goal Date
5. Choose Goal Classification
6. Select Goal Type
7. Enter Goal Description
8. Set Target Completion Date
9. Select Overall Status
10. Click Add Goal to Save

**Goal** [Print] [Close]

**Goal - (4) Gilmore, Rory**

▼ Household Members **1**

This Client is not a member of any Households.

<b>Provider *</b> <b>2</b>	Homeless Leadership Alliance of Pinellas, Homeless Prevention (16841) ▼
Case Manager <b>3</b>	Jessica Jones ▼
<b>Date Goal was Set *</b> <b>4</b>	03 / 07 / 2025 [Calendar] [Refresh] [Calendar]
<b>Classification *</b> <b>5</b>	Housing ▼
<b>Type *</b> <b>6</b>	Maintain housing stability ▼
Goal Description <b>7</b>	Prevent eviction [Text Area]
Target Date <b>8</b>	/ / [Calendar] [Refresh] [Calendar]
<b>Overall Status *</b> <b>9</b>	In Progress ▼
If Closed, Outcome	-Select- ▼ [Calendar] [Refresh] [Calendar]
If Partially Complete, Percent Complete	-Select- ▼

Projected Follow Up Date	/ / [Calendar] [Refresh] [Calendar]
Follow Up User	-Select- ▼
	-Select- ▼
Follow Up Made	-Select- ▼
Completed Follow Up Date	/ / [Calendar] [Refresh] [Calendar]
Outcome at Follow Up	-Select- ▼

**10** **Add Goal** Cancel

# ENTER CASE NOTE

The Case Notes section will appear once you save the goal.

1. Select Household Members
2. Choose Provider/Program
3. Add Yourself as Case Manager
4. Enter Note Date
5. Write Out Case Note
6. Save Case Note




Provider	Case Manager	User Creating	Note Date	Note
<b>Add Case Note</b>				
No matches.				

### Case Note

Case Note - (4) Gilmore, Rory

▼ Household Members **1**



This Client is not a member of any Households.

Provider *	<b>2</b>	Homeless Leadership Alliance of Pinellas, Homeless Prevention (16841) ▼
Case Manager	<b>3</b>	Jessica Jones ▼
Note Date *	<b>4</b>	03 / 07 / 2025   
Note *	<b>5</b>	Working with landlord to pay late rent, past due 3 months, in order to avoid eviction.

**6** **Save Case Note** **Cancel**

SAVE GOAL

**Case Notes**

	Provider	Case Manager	User Creating	Note Date	Note
 	Homeless Leadership Alliance of Pinellas, Homeless Prevention	Jessica Jones	Heather Nix	03/07/2025	Working with landlord to pay late rent, past due 3 months, in order to avoid eviction.

[Add Case Note](#) Showing 1-1 of 1

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**Action Steps Planned**

Action Step	Target Date	Status	Outcome
No matches.			

[Add Action Step](#)

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**Service Items for this Goal**

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

[Add Service](#) [Add Multiple Services](#)

[Print](#) [Save Goal](#) [Save & Exit](#) [Exit](#)

# ADDING ADDITIONAL CASE NOTES

Go to the Case Plan tab and click on the Notes icon in line with the goal. This is where you will enter additional notes without having to create a new goal each time you add your notes.

## Client - (4) Gilmore, Rory

(4) Gilmore, Rory

Release of Information: **None**

### Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers



**Case Plans**

### Goals

	Classification	Type	Date Added	Date Set	Notes	Date
 	Housing	Maintain housing stability	03/07/2025	03/07/2025		03/0

Add Goal

Showing 1-1 of 1

Case Notes					
	Provider	Case Manager	User Creating	Note Date	Note
 	Homeless Leadership Alliance of Pinellas, Homeless Prevention	Jessica Jones	Heather Nix	03/07/2025	Working with landlord to pay late rent, past due 3 months, in order to avoid eviction.
<b>Add Case Note</b>			Showing 1-1 of 1		
<b>Print</b>			<b>Cancel</b>		




# ADDING ADDITIONAL CASE NOTES

### Case Note

Case Note - (4) Gilmore, Rory

▼ Household Members

This Client is not a member of any Households.

Provider *	Homeless Leadership Alliance of Pinellas, Homeless Prevention (16841) ▼
Case Manager	Jessica Jones ▼
Note Date *	03 / 07 / 2025   
Note *	Back rent successfully paid, eviction avoided. Client is able to maintain housing, self-sufficiency achieved.

**Save Case Note** **Cancel**

Once you click on the Notes Icon, the Case notes window will open, click Add Case Note and enter information as previously outlined, Save Case Note.

Client - (4) Gilmore, Rory

(4) Gilmore, Rory

Release of Information: **None**

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Goals

	Classification	Type	Date Added	Date Set	Notes
 	Housing	Maintain housing stability	03/07/2025	03/07/2025	

 Showing 1-1 of 1

Once the goal has been achieved, click the pencil next to the goal to update the Overall Status, enter the Outcome and closure date.

CLOSE GOAL

# CLOSING THE GOAL

Once you have achieved the goal, go into the Goal by selecting the pencil. Enter appropriate information and Save.

4) Gilmore, Rory

Household Members

Person is not a member of any Households.

Organization \*

Homeless Leadership Alliance of Pinellas, Homeless

Case Manager

Jessica Jones ▾

Goal was Set \*

03 / 07 / 2025



Classification \*

Housing ▾

Sub \*

Maintain housing stability ▾

Description

Prevent eviction

Start Date

03 / 07 / 2025



Goal Status \*

Closed ▾

Completed, Outcome

Achieved ▾

Partially Complete,  
Not Complete

-Select- ▾